

Connections | March 2026

Managing your personal wealth isn't just about the dollars and cents. It's about connecting with what matters to you. Across all generations from life changes through life stages, Mesirow is here to help. That's why every quarter we write content on topics that we hope are relevant and insightful for you.

The ABCDs of Medicare

Created in 1965, Medicare is a federal health insurance program designed for people ages 65 and over. Regardless of income, medical history, or health status, these individuals are covered.

In the program's history, it's expanded in various ways, such as the inclusion of coverage for prescription drug plans and private Medicare Advantage plans that offers a variety of needs depending on budget. The cost can change every year — in 2026, most people with Medicare saw a 2.8% cost-of-living-adjustment (COLA) in their Social Security benefits.

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Tax time is approaching: What to track and tell your CPA this year

With April 15 right around the corner, now is a great time to start organizing your 2025 tax preparation. Some items that may have seemed meaningless in the past now matter given the recent law changes. Below are a few helpful reminders, and some new things to think about differently under the new tax law.

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An introduction to "Trump Accounts": What, when and how

The One, Big, Beautiful Bill Act (OBBBA), signed into law on July 4, 2025, created a new tax-advantaged savings account for children under age 18. Officially named the "Trump Account" in legislation, this new type of account is similar to an Individual Retirement Account but has special rules that govern its establishment, funding, investment and distribution.

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Cultivating a healthy money mindset: Finding financial gratitude

Money touches nearly every aspect of life, from daily routines to long term dreams. Between rising prices, market ups and downs, and everyday financial pressures, it can be easy to focus on uncertainty and lose sight of what is going well.

Finding gratitude, grace and purpose in your financial life can help create balance and confidence, no matter what the headlines say.

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Tools you can use

2026 PLANNING GUIDE

This guide is a consolidated list of the annual contribution limits, tax rates and payment requirements for 2026.

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ESTATE PLANNING IS NOT A DIY TASK

Having an estate plan ensures that your legacy will live on. But these decisions can be intimidating, existing at a nexus of numerous investment vehicles, confusing tax regulations, opaque insurance policies and legal contacts. Let us help you, using our in-house estate planning resources.

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